



# The State Bar of California

Agenda Item A.5.  
06-07-19 Meeting  
Open Session

## ACTION SUMMARY

### Task Force on Access Through Innovation of Legal Services Subcommittee on Unauthorized Practice of Law / Artificial Intelligence

May 13, 2019  
11:30 a.m. – 2:00 p.m.

The State Bar of California  
845 South Figueroa Street  
Board Room, 2nd Floor  
Los Angeles, CA 90017-2515  
(213) 765-1000

**Members Present:** Abhijeet Chavan (Chair), Hon. Wendy Chang (Vice-Chair), Heather Morse, Daniel Rubins, and Joshua Walker.

**Not Present:** Simon Boehme and Margie Estrada.

**Others Present:** Brady Dewar (State Bar staff), Donna Hershkowitz (State Bar staff), Joyce Raby, and Andrew Tuft (State Bar staff).

## ACTION SUMMARY

### A. CHAIR'S REPORT

#### 1. **Roll Call**

The Chair called the meeting to order and asked staff to take a roll call of the subcommittee members. A quorum was present.

#### 2. **Call for Public Comment**

The Chair inquired but there was no one present who wished to provide public comment.

#### 3. **Chair's Report**

The Chair summarized the accomplishments of the last meeting, and summarized the agenda for the current meeting.

#### 4. **Staff Report**

Brady Dewar discussed the tasks the subcommittee must complete prior to the end of the June 28 Task Force and subcommittee meetings, and suggested that the subcommittee consider scheduling an additional meeting before the June 28 Task Force and subcommittee meetings.

5. **Approval of Action Summary from the April 8, 2019 Meeting**  
The Action Summary from the April 8, 2019 meeting was approved.

B. **ACTION/REPORT RECOMMENDATION**

1. **Discussions and approvals of recommendations for submission to full Task Force**

The following recommendations were discussed and approved for submission to the full Task Force:

- a. Recommendation: Retain California's case law definition of the practice of law, and do not seek to codify it in a rule or statute.
- b. Recommendation: Add an exception to the prohibition against the unauthorized practice of law permitting State Bar-certified/registered/approved entities to use technology-driven delivery systems to engage in authorized practice of law activities.
- c. Recommendation: Regulation of an entity permitted to practice law using technology-driven delivery systems must incorporate standards sufficient to provide the same level of protection provided to clients of licensed attorneys.

2. **Discussion of additional work to be done prior to June 28 plenary session**

The subcommittee engaged in a discussion of the additional work to be completed. The subcommittee agreed to discuss and consider for approval the remaining draft recommendations from the agenda for the May 13 subcommittee meeting at an additional subcommittee meeting to be held on June 7 at 11 am. Additionally, the subcommittee agreed to discuss and consider a potential new recommendation regarding scaling of fees based on non-profit status, revenues, and/or profits. Vice-chair Hon. Wendy Chang agreed to prepare a draft recommendation for discussion and consideration at the June 7 meeting.

**ADJOURN**

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